Social Fund for Development

Terms of Reference
for
Individual Consultant

Awareness Raising Workshop and Coaching on Marketing Planning and Branding

Under "Support to Micro, Small and Medium Enterprises in Organic Clusters Project"

Line Item # (9)

"Workshops and round table discussions to build capacity of stakeholders"

(e.g. Branding Cluster Products awareness raising training workshop for stakeholders)

(July 21, 2016)

1. INTRODUCTION AND BACKGROUND INFORMATION

1.1. Basic data

Project Name: Support to Micro, Small and Medium Enterprises in Organic Clusters Project.

Financing Mechanism: MENA Transition Fund

Implementing Support Agency: African Development Bank

Grant No: G-EG-AAG-ZZZ-001

Date of Signature: 29/05/2013

1.2. Project background:

After 2011 Egyptian Revolution, the G8 launched the Deauville Partnership to support the countries of the Middle East and North Africa as they transition towards democracy. Within the framework of Deauville, the MENA Transitional Fund was established as a broad-based technical assistance program to finance country-owned projects that aim at introducing reforms at the governance, social and economic levels. As an eligible recipient, the Government of Egypt represented by Social Fund For Development in partnership with the African Development Bank, agreed to implement a project to create an overall enabling environment for Micro, Small, and Medium Enterprises (MSMEs) operating out of organic clusters and increase their contribution towards economic growth and employment. The outcome of this project will feed into the larger policy framework for the MSME which is under development and currently led by the SFD. The project started in September, 2013 and will end in June 2017.

The project's objective is to create an overall enabling environment for Micro, Small, and Medium Enterprises (MSMEs) operating out of organic clusters and increase their contribution towards economic growth and employment.

The implementing agency for this project is the Egypt Social Fund for Development (SFD), mandated to coordinate the development of the Micro and Small Enterprises in Egypt, thereby contributing towards poverty reduction and job creation. This is achieved through policy development, the provision of financial and non-financial services, as well as the coordination and implementation of community development initiatives. SFD works through 31 Regional Offices covering all the governorates to provide and facilitate the provision of financial and non-financial services. The SFD website: www.sfdegypt.org

1.3. Definition of Organic Cluster:

The project adopts the following definition of clusters: **"Clusters are geographical concentrations of inter-connected enterprises and associated institutions that**

face common challenges and opportunities". The organic cluster definition according to the project is: **"Organic clusters are any cluster that has been initiated without governmental planning"**. The project will target organic clusters that produce any type of product (handicraft, agribusiness, industrial…etc.) and aim at increasing MSMEs' contribution to manufacturing value added.

2. CONTEXT AND TARGETED GROUPS

2.1. Context:

One of the main components of the project "Increase organic MSME contribution to manufacturing value added". Taking into consideration that MSMEs in clusters require substantial capacity building, coaching and on the job training to boost productivity and marketing capabilities; and given that the cost of launching a cluster development program can be substantial, the Organic Clusters Project focuses its resources on two pilot clusters; namely the Furniture Cluster in Damietta as well as the Hand-made Carpet Cluster in several geographic areas including Monofeya, Fowa, Beni-Suef.

Since many of the challenges facing these two clusters are marketing related, the SFD in collaboration with Egyptian Export Council for Handicrafts (EECH) provided key NGOs in these two clusters the opportunity to participate in Furnex 2015 & 2016, La Casa 2016. This provided the NGOs and a group of MSMEs in the two clusters exposure to the needs of international market requirements, the opportunity to expose/ sell their products to local/ foreign buyers who visited that exhibition, and identified opportunities to conclude business deals with international visitors. In addition, the project provided training and coaching needed to stakeholders in the targeted pilot clusters to understand the requirements for export procedures, as well as the requirements to effectively participate in trade fairs locally/ internationally. Development practitioners in SFD and other stakeholder organizations concerned with the development of targeted clusters participated in this training.

Feedback received after participating in trade fairs and export training reflected that branding products is essential to the growth and development of pilot clusters and that NGOs and MSMEs do not have background information on Branding. Moreover, development practitioners in the SFD and stakeholder organizations concerned with the development of targeted clusters also limited understanding of branding; and do not have adequate knowledge and skills needed to effectively plan and implement branding related interventions to NGOs/MSMEs in clusters to enable them to move towards brand building. Moreover, the government of Egypt has recently put more emphasis on

Branding, and under the auspices of the Ministry of Trade and Industry a campaign has been launched during the month of Ramadan to promote “Proudly Made in Egypt”. Therefore, the project is planning to commission an individual consultant to provide training and coaching needed to key stakeholders concerned with clusters development to increase their awareness of marketing planning and branding, and explore areas of collaboration among key stakeholders concerned with clusters development in clusters branding; particularly the project targeted clusters.

2.2. Targeted Stakeholders Concerned with development of Project Pilot clusters:_

1- From SFD (Approx. 15 participants)
   - From Non-financial Services Central Sector -NFSCS: NFSCS Technical Office (2),
     Industrial Development Department (4), Marketing Department (2), e marketing Department (2), and One Stop Shop (1).
   - Exhibitions Department (1)
   - Regional Offices Central Sector: Representatives of Central Sector, representatives of Regional Offices such as Damietta, Monofeya, Kafr El-Sheikh..etc. (3)
2- Media Department – MoTI (Approx. 1 participants)
3- Federation of Egyptian Industries - FEI (Approx. 2 participants)
4- Industrial Training Council – ITC (Approx. 1 participants)
5- International Trade Point (Approx. 1 participants)
6- Industrial Council for Technology and Innovation – ICTI (Approx. 1 participants)
7- Furniture Technology Centers (Approx. 1 participants)
8- Textile Technology Centers (Approx. 1 participants)
9- Egyptian Export Council for Handicrafts – EECH (Approx. 1 participants)
10- Furniture Export Council - FEC (Approx. 1 participants)
11- Chairperson of key NGOs in targeted clusters - MSME representatives (Approx. 3 participants)

Note: Targeted participants will not exceed 30 participants.

3. CONSULTANCY OBJECTIVES:

The objectives of this assignment are:

(A) Conducting Training Workshops

To conduct the following training workshops/ session to all targeted participants

(i) To conduct crash course in marketing planning to raise targeted participants awareness in marketing planning

(ii) To conduct training workshop on Branding to increase participants awareness and understanding of branding of products/ services as well as clusters' branding

(B) Development of Collaboration Framework and Policy Recommendations for Clusters Branding

(i) Develop a stakeholders collaboration framework that highlight roles and

contribution of each stakeholder in assisting project pilot clusters in moving towards brand building as well as an Action Plan for the next 6 months.

(ii) Identify policy recommendations that could increase clusters potential to move towards brand building

(C) Coaching:

To provide coaching to targeted participants from the SFD HQ to address the specific needs of participants and enable them to practically apply learning acquired during above mentioned training workshops as follows:

(i) To provide coaching needed to enhance the skills of SFD staff member and qualify them to facilitate/ provide technical assistance needed to MSMEs (individual enterprises) to move towards brand building

(ii) To provide coaching needed to enables the SFD staff to develop (or lead the process of developing) a Brand Building Strategy for a specific cluster as identified in the OCP project, in collaboration with cluster stakeholders.

4. CONSULTANT TASKS

The consultant will be required to undertake activities that include but not limited to the following:

- Review of marketing intervention for the OCP project currently implemented by the SFD.
- Prepare and discuss implementation plan and timeframe of the assignment with the SFD before proceeding with implementation.
- Conduct a needs assessment for participants from the SFD to be able to select appropriate training methodology and design.
- Prepare and discuss with SFD the workshops' design, material, (power point presentations, participants handouts, …etc.) prior to the delivery of the workshops and make modifications needed.
- In consultation with SFD, explore and gather detailed information on the on-going campaign, launched during the month of Ramadan under the auspices of MOTI, to promote “Proudly Made in Egypt” and identify specific entity/ staff members in charge of this campaign and coordinate with them as needed to achieve assignment objectives. With particular focus on exploring options to extend this campaign to project targeted clusters (Damietta furniture cluster & Handmade carpet cluster) so that they become success stories for this campaign.
- Conduct a facilitated workshop for one day involving targeted participant to develop a Stakeholders Collaboration Framework to assist the furniture cluster in Damietta and the handmade carpet cluster to move towards brand building, and ensure that the framework includes clear roles and financial/ in-kind

contributions from each stakeholder and an action plan for the upcoming 6 months.. This facilitated session should be designed and facilitated in a way that encourages stakeholders representatives to propose policy recommendations that could increase clusters potential to move towards brand building. Consideration: These workshops will be conducted in Cairo involving key development practitioners concerned with the development of project pilot clusters from all targeted stakeholder organizations listed above.

- Following the workshop to be conducted in Cairo; several coaching sessions to be provided to SFD NFSCS staff at the SFD premises to address specific needs of NFSCS departments/ staff to be able to apply learning acquired and design and facilitate/deliver business development services to MSMEs to move towards brand building.
- The consultant could invite guest speakers (volunteer MSME owners or development practitioner from Governmental/ non-governmental organization) during workshops or training/ coaching sessions to introduce branding success stories/ best practices or provide an overview of successful branding related development interventions rendered to MSMEs by Governmental/ non-governmental/ donor organizations.
- Develop and submit to the SFD the assignment's final report which will include: (i) the impact of the training on the competencies of targeted participants; (ii) the Stakeholder Collaboration Framework and potential of each stakeholder organization to undertake branding related developmental activities for MSMEs in the cluster in general and for OCP in particular; (iii) A proposed Action Plan for stakeholder collaboration for OCP targeted clusters for the next 6 months: (iv) Recommendations of further capacity development activities needed for each stakeholder organization.
- A power point presentation of the recommendations and the overall results of the assignment and will be introduced to SFD top management during a brief section to be held at the SFD at the end of the assignment. This presentation could be introduced during future multi stakeholders dissemination workshop to be organized by the project.
- Book and directly pay for the reservation of a conference room in a four/five star hotel in Cairo including two coffee breaks and lunch for participants during workshops. The consultant will also arrange and cover the cost of coffee breaks during coaching sessions.
- Prepare all logistical arrangements needed prior to conducting the workshop/ coaching sessions including but limited to registration, seating, and audio-visual aids such as sound system, photography, projectors, laptop…etc.).
- The consultant will provide the project with digital photos of workshops &

coaching sessions conducted in each during the assignment as well as the list of participants.

- The final report should also include Consultant's recommendations to optimize clusters potential to move towards brand building. The final assignment report includes: clearly stated policy recommendations provided by different stakeholders; how to integrate the branding of the two targeted clusters into the "Proudly Made in Egypt" campaign and specific quality criteria in order to obtain "Proudly Made in Egypt" brand/ logo/ seal; stakeholders collaboration framework the clearly highlight roles & responsibilities and contributions of each organization in assisting pilot clusters in brand building process.
- Preliminary list of key sessions/ workshops to be conducted during the assignment:

Session Name	Session Duration	Session Purpose/ outcome	Participants in Session	Session Venue
1- Training workshop on marketing planning and Branding	Two-days	**Purpose**: - Conducting a crash course in marketing planning followed by training workshop on branding **Outcome:** - Increased targeted participants' awareness and understanding of marketing planning branding of products/ services as well as clusters' branding	All targeted participants in this assignment. (Approximately 30 participants)	Conference room in a hotel
2- Facilitated roundtable workshop to to discuss areas of collaboration among stakeholders in clusters branding	One day	**Purpose**: - To conduct a facilitated discussion and planning session to identify areas of collaboration among stakeholders in clusters branding **Outcomes:** - Stakeholders collaboration framework that highlight roles and responsibilities and contribution of each stakeholder to assist clusters in general/ project targeted clusters in moving towards brand building - Policy recommendations that could increase clusters potential to move towards brand building	One representative from each targeted organization (Approximately 15 participants)	Conference room in a hotel
3- Coaching Sessions on Clusters Branding development of	3 days (Approx. 1/2 day for	**Purpose**: - To provide coaching needed to enhance the skills of targeted participants form the SFD HQ topics discussed	Targeted SFD HQ staff	SFD Premises

Clusters Branding Strategies	each SFD Dept. Followed by one day for all targeted SFD HQ staff to develop Strategy template)	during branding training provided **Outcomes:** - Brand building strategy template developed that could be used by the SFD to assist any targeted branding - Enhanced skills of SFD HQ staff in branding and qualify them to facilitate/ provide technical assistance needed to individual enterprises or clusters to move towards brand building		

Overall Considerations:

- The training workshops will be conducted mainly in English language and as well as development of the training material/ handouts. However, Arabic language could be used as needed during discussions.
- The consultant will share with SFD an e-copy of all data collected/ used during the assignment (e.g. any material, tools, templates, documents, presentations… etc.; and it will be the property of SFD upon completion of the assignment.
- All reports / documents developed by the consultant must be submitted to SFD in hard copy and editable electronic copy; using the following formats MS Word format/ Excel/ Power Point.
- The consultant will be responsible for logistic arrangements needed to deliver the training workshops and coaching including printing/ photocopying material, stationary, registers, workshop venue, breaks for participants…etc; and should be included in the financial proposal submitted by the consultant.

4. DELIVERABLES TIMEFRAME

4.1. The following table provides timeframe for assignment deliverables:

Deliverables Sequence	Deliverable Description	Deliverable Due date
Deliverable (1) Inception report	Includes implementation plan & timeline, of the assignment	3 days after awarding of the contract.
Deliverable (2) Training material to be used during the assignment	Training program design, agenda, material to be used during workshops as well as coaching including handouts, power point presentations, exercises, tool kits…etc.	1 week after approval of Deliverable (1) Inception Report
Deliverable (3): - Two-day training workshop on marketing planning and Branding	- Crash course in marketing planning followed by training workshop on branding to increase targeted participants awareness and understanding of marketing planning branding of products/ services as well as clusters' branding	1 week after completion & approval of Deliverable (2)
Deliverable (4): - One-day workshop and development of Brand Building Stakeholders Collaboration Framework	- Workshop involving targeted participant to discuss areas of collaboration among stakeholders in clusters branding; - Stakeholders collaboration framework that highlight roles and responsibilities and contribution of each stakeholder to assist project targeted clusters in moving towards brand building - Policy recommendations that could increase clusters potential to move towards brand building	
Deliverable (5) Three days of coaching on Clusters Branding And development of Clusters Branding Strategy Template	- Coaching needed to enables the participants from SFD HQ to develop a Brand Building Strategy for any specific cluster and provide assistance needed to clusters during strategy implementation. - Brand building strategy template that could be used by the SFD to assist any targeted cluster in the development of a branding strategy and implementation guidelines.	1 week after completion of Deliverable (4)
Deliverable (6) Assignment final report	Final assignment report including: - Impact of the training on the competencies of targeted participants and potential of each stakeholder organization to conduct branding related interventions for clusters. - Recommendations to optimize clusters potential to move towards brand building. - Recommendations of further capacity development activities needed for each stakeholder organization in marketing/ branding	1 week after finalizing Deliverable (5)

4.2. The level of effort for the assignment is 19 man days.

6. CONTRACTING & TERMS OF PAYMENT

6.1. Assignment Commencement Date & Duration

The intended commencement date of the assignment is August 23, 2016 and the period of execution of the contract is expected to be 5 weeks, up till September 30, 2016.

6.2. Budget:

Requested budget should include all relevant assignment cost, broken down into the various budget components including logistical arrangement needed to conduct the assignment. The consultant should use his/ her own computer, accommodation, means of transportation to conduct this assignment. No miscellaneous costs can be accepted for reimbursement.

6.3 Terms of Payment

The consultant will receive payment upon delivery of assignment deliverables and their approval of SFD as follows:

Payments Order	Payment Terms
1st Payment: 10%	Upon successful completion of Deliverable (1)
2nd Payment: 20%	Upon successful completion of Deliverable (2)
3rd Payment: 35%	Upon successful completion of Deliverable (3 & 4)
4th Payment: 25%	Upon successful completion of Deliverable (5)
5th Payment: 10%	Upon successful completion of Deliverable (6)

7. PROJECT MANAGEMENT

7.1. Responsible body:

Social Fund for Development - 120 Mohie El Din Abul Ezz St., Dokki, Giza, Egypt. The focal point for this assignment from SFD will be the Manager of the Organic Clusters Projects.

7.2. SFD Contribution:

- Prior to training workshop; The SFD will share with the consultant background information on each organization/ participating in the training and provide the consultant an overview of NGOs' previous/ current/ planned activities in the project targeted clusters with particular focus on marketing related activities

8. CONSULTANT QUALIFICATION:

The key qualifications for the consultant are:

- Holder of university degree in commerce, business administration, Mass communication or relevant discipline. Post graduate studies is an advantage.
- 8-10 years of hands-on experience in marketing/ branding
- Possess experience in conducting similar consultancy assignments (training/ coaching/ technical assistance).
- Hands-on experience in providing technical assistance to MSMEs in brand building
- Experience in working with development organizations/ Donor-funded projects is an asset; particularly in implementing marketing/ branding related activities
- Excellent interpersonal, communication, and facilitation skills.
- Excellent computer and report writing skills.
- Proficiency in Arabic and English languages (written and spoken)